

Industry Revenue Down Slightly in First Quarter 2008

Source EDA Consortium, Market Statistics Service Press Release

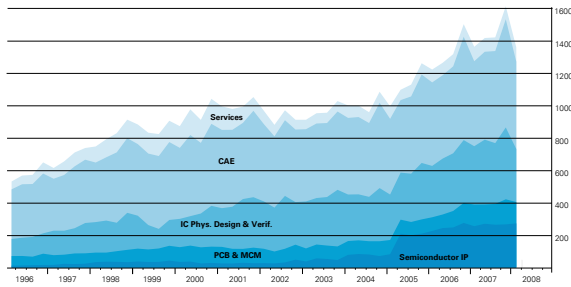


Chart 5.01: EDA and SIP Revenue, Q1 1996 to Q1 2008 [in Million US-\$]

The EDA Consortium (EDAC) Market Statistics Service (MSS) announced that the electronic design automation (EDA) industry revenue for Q1 2008 declined 1.2 % to \$1350.7 million compared to \$1366.8 million in Q1 2007. The four-quarter average growth rate, which compares the most recent four quarters to the same four quarters in the prior year, was up 5.9 %.

“Weakness in the large EDA companies was partly offset by strength in start-ups, with resulting numbers that were slightly down year over year,” said Walden C. Rhines, EDAC chair and Mentor Graphics CEO and chairman. “Main areas of strength were in leading-edge technologies such as electronic system level design, design for manufacturing, design for test, IC layout verification, IC/ASIC power analysis, and RF/mixed-signal design.”

Companies that were tracked employed 27,329 professionals in Q1 2008, up 5.8 percent from the 25,820 employed in Q1 2007.

Revenue by Product Category

EDA’s largest category, Computer Aided Engineering (CAE), generated revenue of \$535.4 million in Q1 2008, representing a 2.7 % increase over the same period in 2007. The four quarter moving average CAE growth rate was 10.6 %. For IC Physical Design & Verification, the next largest category, revenue decreased to \$325 million in Q1 2008, a 9.1 % decrease compared to Q1 2007. The four quarter moving average growth rate increased 6.7 % for IC Physical Design & Verification. Printed Circuit Board and Multi-Chip Module (PCB

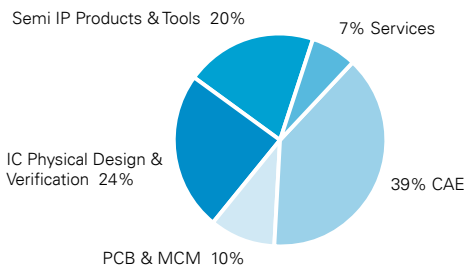


Chart 5.03: Distribution of the total EDA & SIP Revenue of Q1 2008 by Product Category

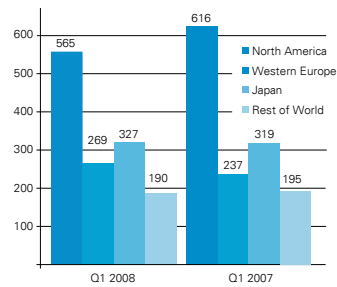


Chart 5.02: Comparison of the total EDA & SIP Revenue by Geographic Region [in Million US-\$]

& MCM) revenue decreased 1.4 % over Q1 2007 to \$131.1 million. The four quarter moving average growth rate for PCB & MCM showed a 4.7 % decrease.

Semiconductor Intellectual Property (SIP) revenue totaled \$271.4 million in Q1 2008, a 1.7 % increase over Q1 2007. The four quarter moving average growth rate for SIP was 1.2 %. Services revenue was \$87.8 million in Q1 2008, down 0.8 % from Q1 2007. The four quarter moving average growth rate for services was 6.0 %.

Revenue by Consuming Region

North America, EDA’s largest region, purchased \$565.1 million of EDA products and services in Q1 2008, which represents an 8.2 % decrease compared to Q1 2007. The four quarter moving average growth rate was down slightly by 0.8 % for North America. Western Europe revenue was up 13.5 % in Q1 2008

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